Chapter 1: Managing Your Company E-Mail

In This Chapter

- **Letting Outlook handle e-mail while you're out of the office**
- **Getting someone else to handle your e-mail and appointments**
- **Managing Mail and Calendar for someone else**

Outlook makes handling life's little nuisances pretty easy. For example, Outlook can automatically organize and categorize incoming mail, remind you to leave early for a dentist's appointment, and even nag you to pick up your laundry. But what about vacations or business trips, when you're out of the office for several days in a row? Do you just let e-mail flood the Inbox, or can Outlook help you there, as well, and notify people that you're out of town so that they won't expect an immediate response?

Perhaps you're a busy professional, and you have a nice assistant who not only keeps track of where you need to be *right now,* but even stops drop-in clients at the door so that you can get to that important appointment on time. As nice as that may sound, the system tends to break down every now and then, especially when you make an appointment and forget to tell your assistant, or vice versa. Can Outlook help you keep your appointments in one place, where both you and your assistant can access and make changes to those appointments? The answer to all these questions is a resounding, "Yes!" as you can see in this chapter.

Exchange 2010 now provides MailTips that stop people up short before they send you e-mail while you're out of town. You just have to let Outlook know. Then, if someone from your company addresses an e-mail to you while you're gone, Outlook pops up a MailTip that displays the message you've left behind so that they know when you get back. Of course, MailTips won't stop someone from sending that e-mail, anyway, but it should slow them down a little.

Letting Automatic Replies Handle Mail While You're Gone

Every time I leave the office for even just the afternoon, I return to find my Inbox full of messages. Some are junk, and some are important. But I don't know which until I take the time to go through them all. Wouldn't it be nice to have someone sitting in for you while you're out, deleting the junk, forwarding the stuff that's important to a colleague so that he or she can act on it in a timely manner, and letting everyone else know that you're not ignoring them, you're just out of the office until tomorrow? Well, actually, you do have someone who can sit in at a moment's notice — the "Out of Office Assistant," which in Outlook 2010 has renamed Automatic Replies.

You can use Automatic Replies only if you work on an Exchange network. If you don't, you're not totally out of luck. You can still do some things to get Outlook to help you with e-mail management. See the section "What to do if you have a POP3 or IMAP e-mail account," later in this chapter.

You can use Automatic Replies to send an instant reply to anyone who e-mails you while you're away. What the reply says is up to you: "I'm out of the office; see Bill if you need immediate assistance" or "Leave me alone. I'm on vacation, you bug!"

You can set up rules to process your e-mail automatically, too. For example, you may want e-mails from particular people passed on to someone in your company, and you may want junk newsletters and such automatically deleted.

Turning Automatic Replies on or off

To turn Automatic Replies on, follow these steps:

1. **Click the File tab to display Backstage, and then select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Automatic Replies button.**

   The Automatic Replies dialog box jumps up to help, as shown in Figure 1-1.

3. **Select the Send Automatic Replies radio button.**

4. **To have Automatic Replies send replies during a set period of time, select the Only Send During This Time Range check box, then, select dates and times from the Start Time and End Time drop-down lists.**

If you want to limit the time when Automatic Replies is active (for example, you want to set it up to work while you're on vacation next week, but not actually turn it on right now), then set the appropriate dates and times for Start Time and End Time.

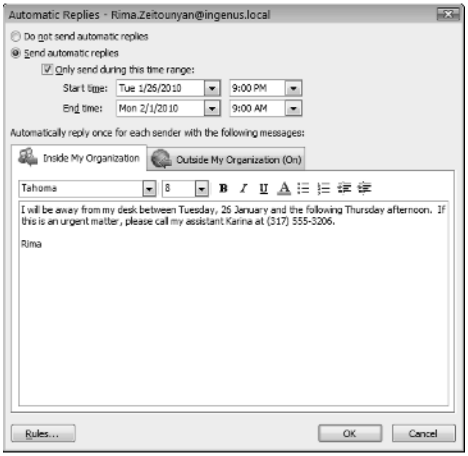

Figure 1-1: Automatic Replies: One assistant you don't have to hire.

5. **To create a message for e-mail received from people you work with, click the Inside My Organization tab located in the middle of the dialog box, and then click inside the text box and type a message.**

6. **To create a message for e-mails received from people you don't work with, click the Outside My Organization tab, as shown in Figure 1-2, and then click inside the box and type your message.**

   Make sure that the Auto-Reply to People Outside My Organization check box is selected.

   You can format the text for your outgoing message(s) however you like by using the buttons just above the text boxes on each tab.

7. **Decide which non-colleagues you want to receive this message.**

   Select one of these radio buttons:

   - *My Contacts Only:* Use this auto reply only with people outside your company who are listed in your Contacts.
   - *Anyone Outside My Organization:* Use this auto reply with anyone who sends you an e-mail who doesn't work in your company — even if he or she isn't in your Contacts list.

WARNING!

If you select the My Contacts Only radio button, the contact who e-mails you must appear in your Exchange Contacts list — either the main list or one that you create. The contact can't appear only in a Contacts list in an offline folder or a personal folder you're using with a POP3, IMAP, or HTTP account.

8. **Click OK to finalize your choices and turn Automatic Replies on.**

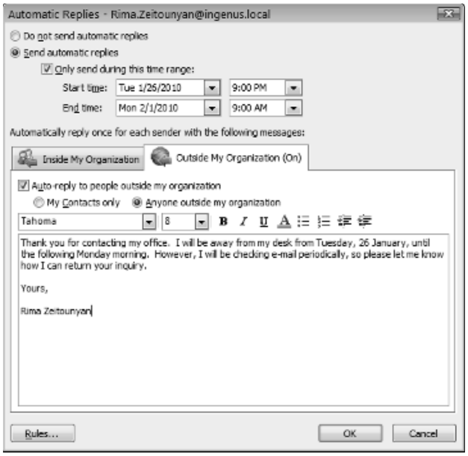

Figure 1-2: Create a message for people outside your company.

When Automatic Replies is functioning, Outlook will present you with a persistent reminder: a big, non-ignorable, yellow bar like police tape that's strapped across the top of the Outlook window in the Mail module that reads, "Automatic Replies are being sent for this account." You can turn off Automatic Replies simply by clicking the Turn Off button that appears on this yellow stripe, nothing else. Or if you feel like going through the motions, here's the formal steps:

1. **Click the File tab to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Automatic Replies button.**

   The Automatic Replies dialog box appears.

3. **Select the Do Not Send Automatic Replies radio button.**

4. **Click OK to turn Automatic Replies off.**

Letting rules control mail while you're away

By using the Rules Wizard, you can create a set of rules to handle your e-mail while you're out — for example, you can move e-mail from one folder to another, forward it to a colleague, or delete it. These rules are different from the ones I discuss in Book IX, Chapter 2, in that they come into effect only when you turn on Automatic Replies.

To create a rule that limits what Automatic Replies can do with certain e-mails when you're at the spa (or wherever), follow these steps:

1. **Click the File tab to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Automatic Replies button.**

   The Automatic Replies dialog box jumps up to help. (Refer to Figure 1-1.)

3. **Click the Rules button.**

   The Automatic Reply Rules dialog box appears (jump ahead to Figure 1-5), showing a list of currently active rules determining the conditions for which e-mail senders receive replies while you're away.

4. **Click the Add Rule button.**

   The Edit Rule dialog box pops up, as shown in Figure 1-3.

Figure 1-3: You make the rules.

5. **In the When a Message Arrives That Meets the Following Conditions pane, select the conditions that define the kind of e-mail with which you want to do something special.**

For example, maybe you want to do something special when an e-mail arrives from your boss or one that has a Subject line that includes *Blackford account,* or just *Blackford.*

For the lowdown on how to select conditions that define the e-mail you want to affect and to set advanced rules options, see Book IX, Chapter 2.

6. **If necessary, you can get nitpicky about which e-mails you want to affect by clicking Advanced and specifying additional conditions.**

   In the Advanced dialog box that appears (see Figure 1-4), you can further define the e-mails you want this rule to apply to. For example, you might want to do something special with large e-mails, e-mails received on a particular day or days, e-mails that include attachments, and so on.

7. **After making your selections, click OK to close the Advanced dialog box.**

   The Edit Rule dialog box reappears. (Refer to Figure 1-3.)

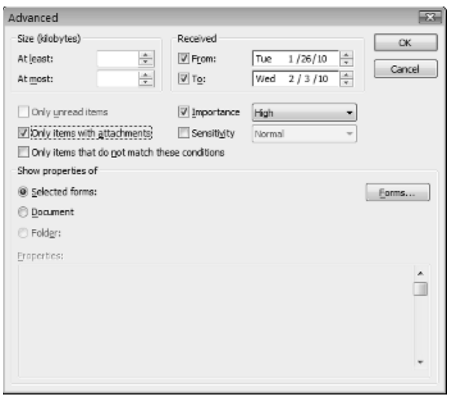

Figure 1-4: Set more options to define which e-mails you want to rule.

8. **If you want this particular rule to be applied last, after all other rules, then select the Do Not Process Subsequent Rules check box.**

   Normally, Outlook applies rules in the order in which they're listed, until every rule has been applied, but turning on this option changes that behavior.

9. **In the Perform These Actions pane, select the action(s) you want to occur with the e-mails that match the conditions you've set.**

   If you're creating a rule that deletes specific e-mail, then for obvious reasons, after that rule is applied, Outlook doesn't go looking at the rest of the rules to see whether any more might apply to the e-mail. You can change the order of rules so that Outlook does something to the e-mail before its deleted, if you want. See the following section for help.

10. **Click OK.**

    The rule is added to your other Out of Office rules, and you're returned to the Automatic Reply Rules dialog box.

11. **To create more rules, just click the Add Rule button, and then rinse and repeat Steps 4 to 9.**

12. **To finish adding rules, click OK to dismiss the Automatic Reply Rules dialog box, then click OK again to dismiss the Automatic Replies dialog box.**

Changing the rules

Just because you created some rules doesn't mean you're stuck with them. You can modify rules to make them work the way you want them to work. You can also delete rules that you don't need.

To modify an existing rule, follow these steps:

1. **Click the File tab to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Automatic Replies button.**

   The Automatic Replies dialog box appears.

3. **Click the Rules button.**

   Your rules are displayed in a list in the Automatic Reply Rules dialog box, as shown in Figure 1-5.

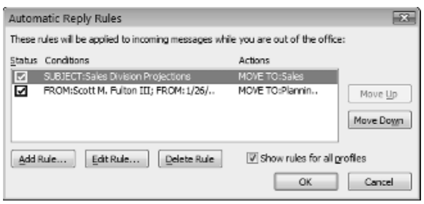

Figure 1-5: Select the rule you want to change.

4. **Select a rule and click Edit Rule.**

   The Edit Rule dialog box appears. (See Figure 1-6.)

5. Make changes, click OK to close the Edit Rule dialog box, click OK to finalize changes to Automatic Reply Rules, and then click OK in the Automatic Replies dialog box to close it.

In other words, OK, OK, OK, enough already.

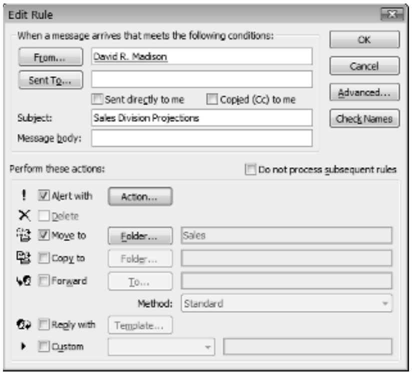

Figure 1-6: Rules aren't set in stone.

To change the order in which rules are applied, follow these steps:

1. Click the File tab to display Backstage, and select Info from the list on the left.

The Account Information options appear on the right.

2. Click the Automatic Replies button.

The Automatic Replies dialog box appears.

3. Click the Rules button.

The Automatic Reply Rules dialog box appears. Refer to Figure 1-5.

4. Select a rule that you want to move up or down in the list.

Rules are applied in the order in which they appear in the list, so moving a rule up means that it's applied before the rules below it. Moving a rule down means that it's applied after other rules that appear above it.

5. Click the Move Up or Move Down buttons.

6. Repeat Steps 3 and 4 to adjust the order of other rules. When you're done, click OK, then click OK again.

To remove a rule completely, follow these steps:

1. **Click the File tab to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Automatic Replies button.**

   The Automatic Replies dialog box appears.

3. **Click the Rules button.**

   The Automatic Reply Rules dialog box appears. Refer to Figure 1-5.

4. **Select a rule that you want to delete.**
5. **Click the Delete Rule button.**

   Why not remove other bothersome rules, such as that red stoplight thing? I mean, why do I have to let others go first just because they have a green light? I like red.

6. **Click OK when you finish.**

What to do if you only have a POP3 or IMAP e-mail account

Well, okay, not everyone has an Exchange network. So, not everyone can just wiggle their fingers and call the Feature Formerly Known as the Out of Office Assistant to take over when they're away from their desks. If you don't have an HTML account, you probably at least use POP3 or IMAP, so you can at least do *something* to handle e-mail when you're away.

TIP

Some HTML (Web-based) e-mail accounts provide simple ways to handle incoming e-mail, so you might be able to use a Web interface to set up a system.

Here's the basic plan: You create a plain text message and save it as a template. Then, you create a rule that uses the template to generate outgoing messages while you're out of the office.

Follow these steps to create the template:

1. **From within Mail, click the New Items button on the Ribbon's Home tab and select E-mail Message from the pop-up menu that appears.**

   A new mail message form pops up (see the background of Figure 1-7).

2. **Click the Plain Text button on the form's Format Text tab.**

   The message is changed to plain text, rather than HTML format. By using plain text, you can't apply any formatting. But you can at least get your message out, especially for folks sending you messages from their mobile phones.

3. **Type the message that you want people to receive while you're gone.**

   WARNING!

   Looking ahead, remember that Outlook, being a bit of a control freak, keeps track of each and every e-mail you receive while you're gone and sends the reply only once to each address, even if somebody sends you a bunch of e-mail. So keep that in mind when you design your message.

   You do not need to enter anyone's address in the To: text box, since you're not sending this message to anyone in particular just now.

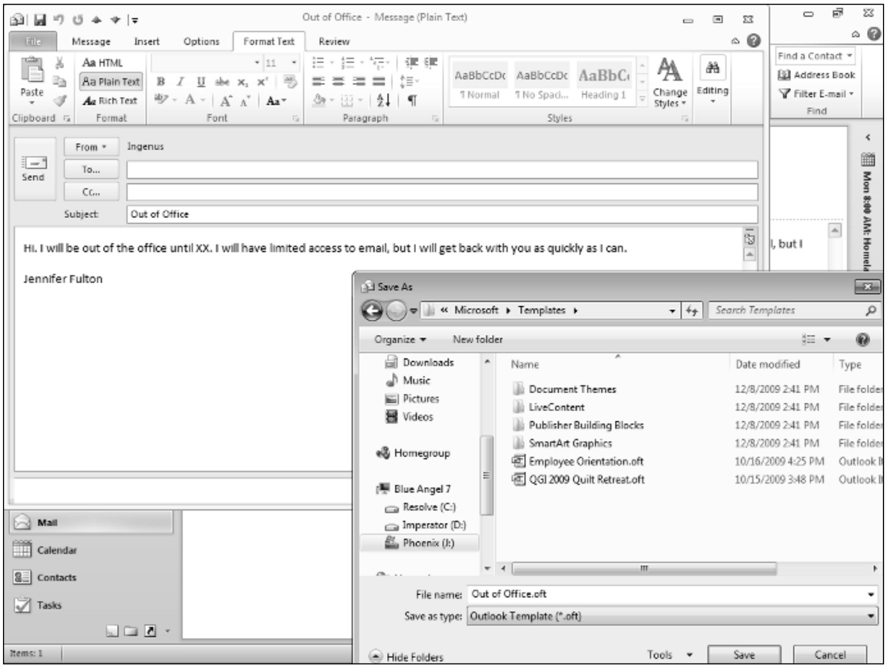

Figure 1-7: Create the message that you want to send when you're out of the office.

4. **To save the message as a template, click the File tab to display Backstage, and select Save As from the list on the left.**

   The Save As dialog box pops up. (Refer to the foreground of Figure 1-7.)

5. **In the Save As Type drop-down list, select Outlook Template.**

6. **Enter a name for your template, such as** `Out of Office`**, in the File Name text box and click Save.**

7. **Click the close box ("X") in the form to close the message.**

Because you saved your message as a template and don't want to send it to anyone just now, don't save any changes to the message. In the dialog box that appears, click No.

After you create a template for your out-of-office replies, follow these steps to create a rule to use that template:

1. **(Optional) To base your rules on the recipients or contents of a certain e-mail message you've already received, change to the Mail module by clicking its button on the Navigation pane, and then click that message in the message list.**

   For example, if you want to create a rule about the sender or the other recipients of a message, or about a meeting whose invitation appears in the message, or about an attachment that appears in a message, then you can select that message first. The Rules Wizard you'll use in a moment will automatically generate possible rules and criteria for you to choose from, based on the message that currently appears in Mail.

2. **Click the Rules button in the Move group on the Home tab and select Create Rule from the pop-up menu that appears.**

   The Create Rule dialog box appears.

3. **Click Advanced Options.**

   The Rules Wizard jumps up. (See Figure 1-8.)

4. **Select which types of messages get replies.**

   For example, you can send replies only to messages sent directly to you and no one else by selecting the Sent Only to Me check box.

   You can set more limiting conditions if you want, or select none at all if you want this rule to apply to all incoming e-mail.

5. **Click Next.**

   If you haven't chosen any criteria here at all, Outlook will bring up a dialog box asking you if you mean to apply this rule to every message (no conditions to be checked here whatsoever). If that's what you meant, click Yes; otherwise, click No to return to the conditions list.

   The What Do You Want to Do With the Message? Rules Wizard page appears.

6. **In the What Do You Want to Do With the Message? list, select the Reply Using a Specific Template check box, as shown in the background in Figure 1-9.**

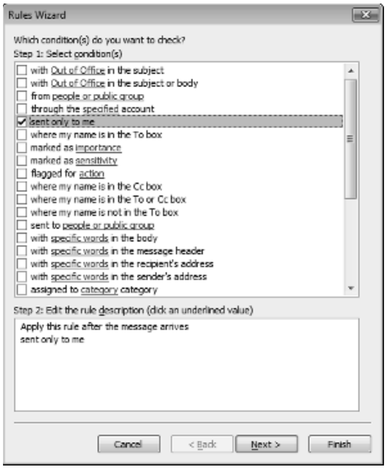

Figure 1-8: The Rules Wizard steps you through the process of creating an e-mail rule.

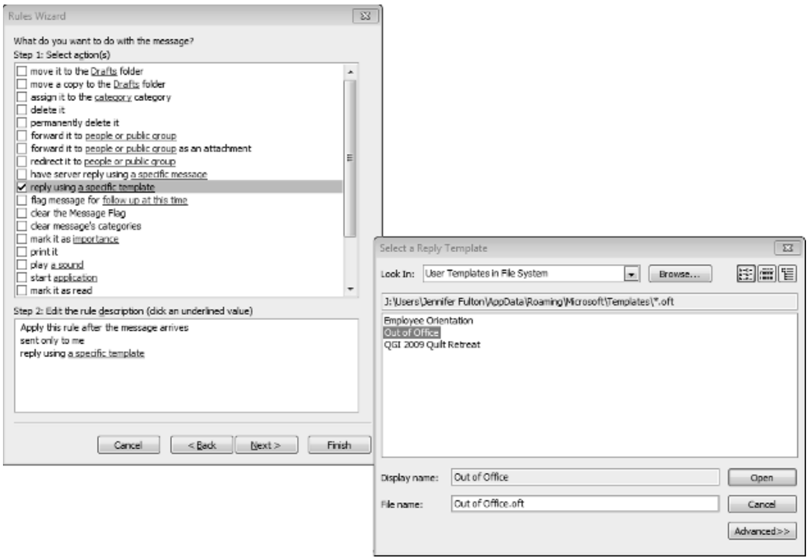

Figure 1-9: Send out auto-replies using a template.

7. **Click the A Specific Template link that appears in the bottom of the page.**

   The Select a Reply Template dialog box opens. (See the foreground in Figure 1-9.)

8. **Select User Templates in File System from the Look In drop-down list.**

9. **In the list box, select the template you just created and click Open.**

   The Select a Reply Template dialog box closes.

10. **Click Next.**

    The Are There Any Exceptions? page of the Wizard appears.

11. **Select any exceptions from the Are There Any Exceptions list.**

    For example, you might not want to send replies to messages that are actually newsletters, or that you know are newsletters because they're flagged with their titles in their subject lines. To choose an exception, click its check box — just as you did for rules/conditions — and then click the hyperlink in the newly created line at the bottom under "Step 2" to select the item that triggers the exception.

12. **Click Next.**

    The Finish Rule Setup page of the Wizard appears.

13. **Type a name for the rule in the Specify a Name for This Rule text box, check the Turn On This Rule check box, and then click Finish.**

    Okay, you don't have to turn the rule on right now if you're not heading out of town. To turn your rule on after you create it, click the Rules button on the Home tab, select Manage Rules & Alerts from the pop-up menu that appears, then select your Out of Office rule to turn it on.

14. **When Outlook gives you the warning that it can only run while Outlook is running, click OK.**

    The Rules Wizard is dismissed.

Now, if you leave Outlook (and your computer) on, and you have Outlook set up so that it automatically checks for e-mail every once in a while, then when you get an e-mail, Outlook automatically creates a reply by using your template.

When you get back into the office, you'll need to turn off your rule. Here are the steps to follow for that:

1. **Click the Rules button in the Move group on the Home tab and select Manage Rules & Alerts from the pop-up menu that appears.**

   The Rules and Alerts dialog box appears.

2. **In the rules list, click the check box beside the rule you want to turn off.**

3. **If you no longer need the rule for any other purpose in the future, then to delete it, click Delete, and respond to the dialog box by clicking Yes.**
4. **Click OK to save your changes.**

Assigning a Delegate to Handle E-Mail and Appointments While You're Gone

If you work on an Exchange network, you can designate someone to act as your delegate, meaning that he or she can take over your day-to-day Outlook operations, including sending e-mails, accepting meeting requests, canceling appointments, and so on. Whether you can get him or her to do your laundry and walk the dog is another story.

In Outlook, you can do a different kind of sharing, which is typically more equal, and involves simply sharing folders. For example, you can share your calendar with someone, and he can share his with you. This sharing might involve only being able to view items in the folder, or it can involve various permission levels all the way up to being allowed to not only view, but create, change, and delete items in the folder. See Book IV, Chapter 3 for how to do this kind of sharing with Calendar; Book V, Chapter 4 for the same for Contacts; and Chapter VI, Chapter 3 for Tasks. Although you can use these same techniques to share an e-mail folder, typically, you use delegate access to allow them to perform certain tasks, acting as you, as described in the following sections.

For delegate access to work, both you and your personal workhorse must not only be on the same Exchange network, but also using the same version of Outlook. Typically, the network administrator makes sure that everyone has the same software, so you probably don't have to worry about compatibility issues. For someone to have access to the e-mails you want him or her to answer, those e-mails must arrive in your regular Exchange mailbox — either the Inbox or some custom folder, not in a personal folder you've created (a completely different data file, which has a `.pst` extension).

Assigning a delegate

When you assign a delegate to take over some of your Outlook Calendar duties, he or she can not only respond to meeting and task requests (by accepting, declining, or tentatively accepting them), but also receive meeting and task responses (responses to meeting or task requests that you've

sent). When people get these meeting/task replies, however, the From field reads something like *Delegate Name* on behalf of *Manager Name.* That way, people know you're not actually responding, but someone acting on your behalf is. For very special delegates, you can adjust the permissions to allow them to do even more — basically acting as your replacement. Don't worry; no matter how many tasks you allow him or her to perform for you, your delegate can't take over your corner office.

To assign a delegate, follow these steps:

1. **Click the File tab, to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Account Settings button, and then select Delegate Access from the drop-down menu that appears.**

   The Delegates dialog box appears.

3. **Click the Add button.**

   The Add Users dialog box jumps up, as shown in Figure 1-10.

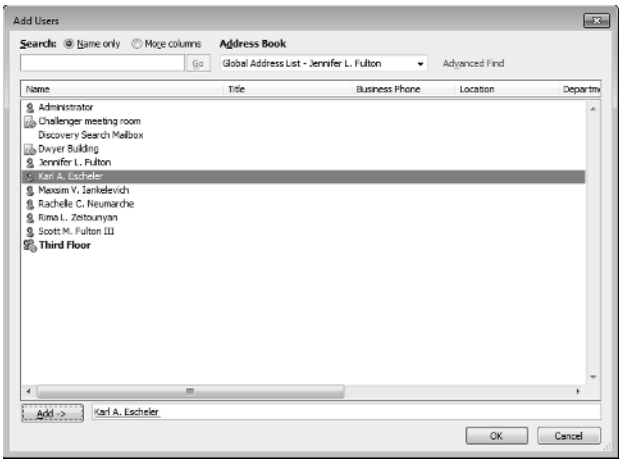

Figure 1-10: Add a delegate.

WARNING!

If that ol' Add button isn't active (if it appears grayed out, in other words), you may not be connected to the Exchange network. Check the status bar to make sure that you're connected properly and that the network isn't down for some reason.

4. **From the list of people, select a workhorse (uh, delegate) whom you want to take over your job while you're gone. Click Add, and then click OK.**

   The Delegate Permissions dialog box appears.

5. **Choose the modules (such as Calendar or Tasks) you want to delegate to the people you've chosen, and change their level of access as needed by selecting a permission level from the appropriate drop-down list.**

   By default, a delegate can reply to meeting requests, and process meeting replies that you receive. He or she can also respond to task requests and task replies. You can allow a delegate to do more, if you want, by changing settings in the Delegate Permissions dialog box, shown in Figure 1-11.

   Even though the Inbox permission level is set to None, if you select the Delegate Receives Copies of Meeting-Related Messages Sent to Me check box, your delegate automatically receives your meeting requests and replies in her Inbox. She doesn't need a higher level of permission for your Inbox unless you want her to read, send, or delete e-mails on your behalf. The Calendar and Tasks permission level is set to Editor to allow the delegate to read and respond to task/meeting requests and task/meeting replies and do other stuff. Here's what each permission level allows your delegate to do:

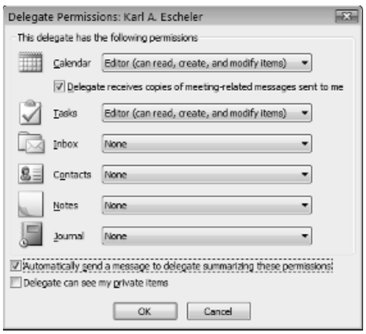

Figure 1-11: You can allow your delegate to do more for you.

   - *Reviewer:* Delegate can only read items.
   - *Author:* Delegate can read any item, create new items, and change or delete only the items he or she creates.
   - *Editor:* Delegate can read any item, create new items, and change or delete any item, even if the delegate didn't create the item.

6. **To create a message to your delegate that summarizes the permissions you've just set, select the Automatically Send a Message to Delegate Summarizing These Permissions check box.**

7. **To allow your delegate to see items that you've marked as private, select the Delegate Can See My Private Items check box.**

   WARNING!

   This option allows a delegate to see all private items in your Exchange data file, regardless of the folder they're in.

8. **When you're through setting options and having fun, click OK.**

   You're returned to the Delegates dialog box. See Figure 1-12.

9. **Select to whom you want copies of meeting requests sent.**

   Select the radio button for the option that you want:

   - *My Delegates Only, But Send a Copy of Meeting Requests and Responses to Me:* Get copies of the meeting requests and replies that arrive while you're gone.
   - *My Delegates Only:* Allow meeting requests and replies to go to your delegate's Inbox only.

Figure 1-12: Set additional options for your delegate.

   - *My Delegates and Me:* Place the original meeting requests and replies in both your delegate's Inbox and yours so that you can also reply to them.

     WARNING!

     The problem with this option is that the two of you might reply differently, and who knows what Outlook would do in that situation.

10. **Click OK.**

    If you select the Automatically Send a Message to Delegate Summarizing These Permissions option in Step 6, your delegate gets an e-mail letting him know his duties and the permission levels you set. Your delegate can now take over the tasks (replying to meeting requests, for example) that you've assigned.

See "Managing Someone Else's E-Mail and Calendar," later in this chapter, for help with what to do if you've been made someone else's delegate.

Changing a delegate's permission levels

To change what a delegate can do for you, follow these steps:

1. **Click the File tab, to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Account Settings button, and then select Delegate Access from the drop-down menu that appears.**

   The Delegates dialog box jumps up. (Refer to Figure 1-12.)

3. **Select the delegate you want to change and click the Permissions button.**

   The Delegate Permissions dialog box peeks out (see Figure 1-13).

4. **To change the access level for one of your Outlook modules, such as Contacts or the Calendar, make a selection from the appropriate drop-down list.**

   Your options include Editor, Author, Reviewer, or None. (For more on the mechanics of setting permission levels, see the "Assigning a delegate" section, earlier in this chapter.)

Figure 1-13: Changing the permissions that you gave a delegate.

5. **Repeat Step 3 for other modules, as desired.**
6. **Click OK to close the Delegate Permissions dialog box, and then click OK to close the Delegate dialog box.**

You can also remove a delegate altogether, which you may want to do after you get back to work, by following these steps:

1. **Click the File tab, to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.
2. **Click the Account Settings button, and then select Delegate Access from the drop-down menu that appears.**

   The Delegates dialog box jumps up. (Refer to Figure 1-12.)
3. **In the list, select the delegate you want to remove.**
4. **Click the Remove button.**

   The delegate is removed from your Permissions list and can no longer access your various Outlook folders. Your delegate doesn't get any e-mail letting her know that she's now off the hook, so you might want to drop an e-mail yourself to thank her for her hard work and to tell her to stop reading your mail.
5. **Click OK to close the Delegates dialog box.**

Managing Someone Else's E-Mail and Calendar

You might be given access to somebody else's Outlook folders in several ways. If someone wants to control exactly what you can do and doesn't want you acting on his or her behalf, you were probably given access to a shared folder. You can find help managing these folders in Book IV, Chapter 3 (for Calendar); Book V, Chapter 4 (for Contacts); and Book VI, Chapter 3 (for Tasks).

The following sections discuss what to do when you receive delegate access to someone's folders. With this kind of access, when you create items, you do it by acting on the other person's behalf. If you send a task request, for example, everyone knows that it came from you, but on behalf of someone else. So, no, you can't plan an eight-hour "doing nothing" meeting just to get some time off, without your boss eventually catching on.

Displaying somebody else's folders

When someone sets you up as a delegate, you get an e-mail that details exactly which folders you have access to and what you can do in them. You probably want to display that person's folders in your Outlook right away so that you can keep an eye on them.

WARNING!

Although delegate access is great, unless the person designated as the delegate also makes his or her mailbox visible, you can't access it through the Navigation pane. And if that designee is you, then unless you make the folder visible, you're just no good as a delegate, are you? To make a mailbox visible on the Exchange network, you need to change to Mail, select your Exchange account in the Navigation pane, and click the Folder Permissions button on the Folder tab. The Outlook Today Properties dialog box appears. Click the Permissions tab, and select your delegate from the list of names at the top of the tab. Under Other, select the Folder Visible option and click OK. Then, you can tell your delegate that everything's set.

To add somebody's folders to Outlook so that you can see them each time you start Outlook, follow these steps:

1. **Click the File tab to display Backstage, and select Info from the list on the left.**

   The Account Information options appear on the right.

2. **Click the Account Settings button and select Account Settings from the drop-down menu that appears.**

   The Account Settings dialog box appears.

3. **Select your Exchange account from those listed at the bottom of the E-Mail tab, and click Change.**

   The Change Account Wizard appears. See the background of Figure 1-14.

4. **Click the More Settings button, click the Advanced tab in the Microsoft Exchange dialog box that appears, and then click the Add button.**

   The Add Mailbox dialog box opens, as shown in the foreground of Figure 1-14.

5. **Enter the name of the person whose folders you want displayed in your Outlook, and then click OK.**

   The Add Mailbox dialog box closes, and the person's name appears in the list at the top of the Advanced tab in the Microsoft Exchange dialog box.

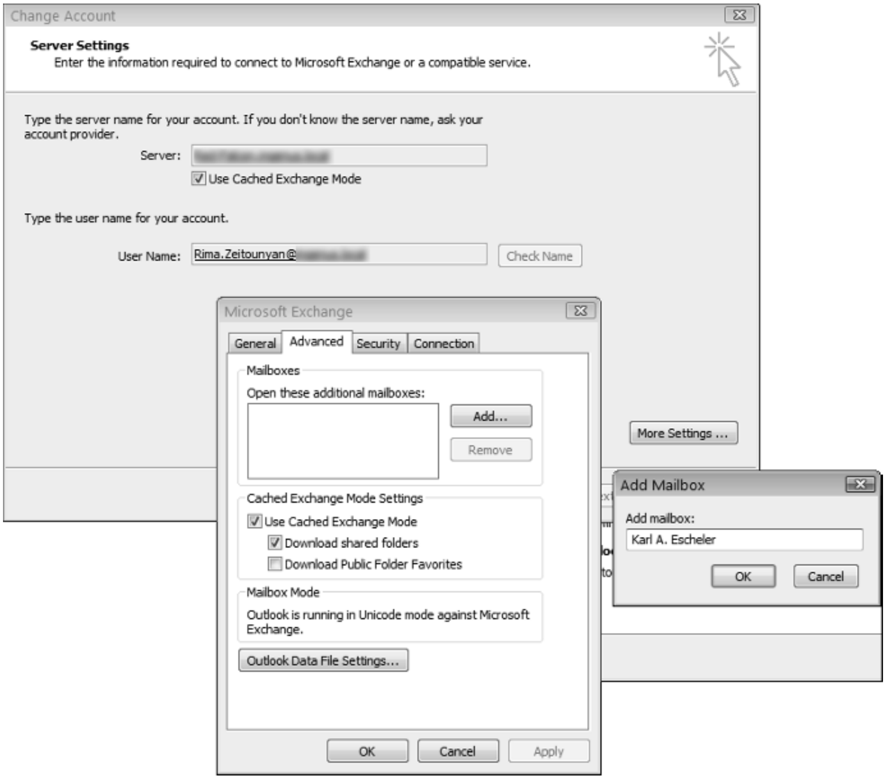

Figure 1-14: The Change Account Wizard.

6. **Click OK to dismiss the Microsoft Exchange dialog box.**

   You return to the Change Account Wizard.

7. **Click Next.**

   Outlook has a little message of congratulations for you in this last page of this most flamboyant wizard.

8. **Click Finish.**

   The Account Settings dialog box peeks back out.

9. **Click Close and restart Outlook.**

   The name of the mailbox you added will appear in the Navigation pane, typically below your own Exchange account. If you've been delegated access already, then you'll start to see contents right away. If you haven't, the message list on the right will be grayed out and you'll see an ominous looking warning that says the object cannot be found. Once delegation comes through, this warning will go away.

If the person whose name you typed has granted you access to some or all of her folders, you can access her folders from the Navigation pane within the appropriate module. For example, if you have Editor access to the calendar so that you can handle meeting requests and replies, you also have permission to view that person's calendar and to make appointments and events. After following the preceding steps conveniently provided here by *moi,* you can now access that person's calendar easily, as shown in Figure 1-15, in which I've switched over to my calendar and clicked the calendar for Karl A. Escheler (I found it in the Shared Calendars category) to view his calendar side-by-side with mine. You can repeat this process in any other module to which you have access, such as Tasks, to view its items and perform your duly designated duties as delegate.

When you gain access to someone's Contacts folder, you can click only that folder in the Navigation pane at any time to display its contacts.

If you don't want to see somebody's folders hanging out with yours, causing you to accidentally add your appointments to their calendars or vice versa, you can display their folders just when you need them. When you change to a different module or exit Outlook, another user's folder disappears from view, and you need to repeat the following steps to see it again. To temporarily display someone's folder in Outlook (assuming you have permission), follow these steps:

1. **Click the File tab to display Backstage, and select Open from the list on the left.**

   The Open options appear on the right.

2. **Select Other User's Folder.**

   The Open Other User's Folder dialog box appears, as shown on the left in Figure 1-16.

3. **In the Name box, type the name of the person whose folder you want to open temporarily.**

   Alternatively, you can click the Name button, select that person from a list displayed in the Select Names: Global Address List dialog box (refer to right in Figure 1-16), and then click OK to return to the Open Other User's Folder dialog box.

4. **From the Folder Type drop-down list, select the type of Outlook module that you want to open, then click OK.**

   The dialog box closes, and the folder you chose appears in the Navigation pane.

5. **Click that folder to display its contents.**

   For example, in the office setup in Figure 1-16, I changed to Calendar and clicked Rima Zeitounyan in the My Calendars area of the Navigation pane to display her calendar next to yours.

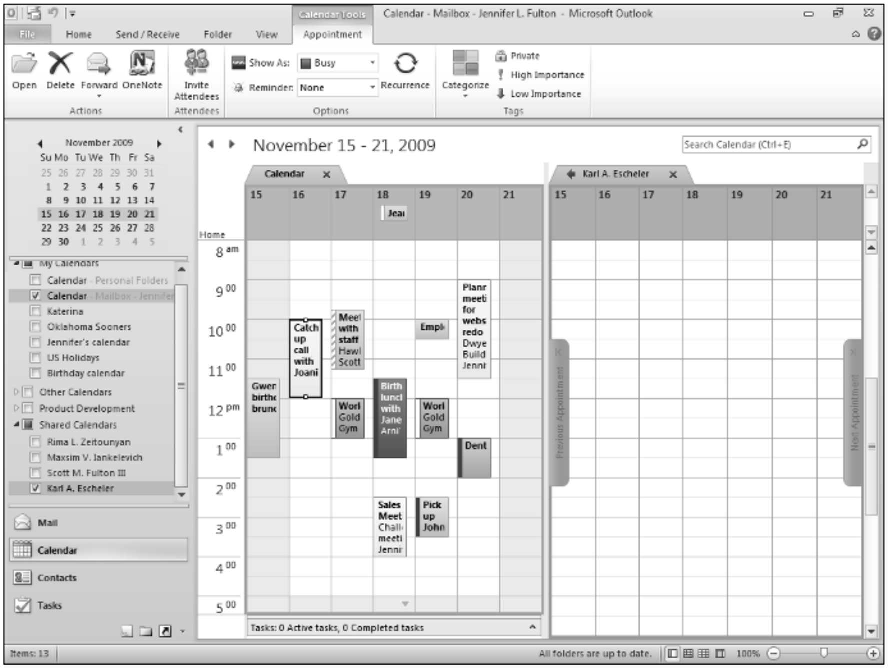

Figure 1-15: Now you can access the folders.

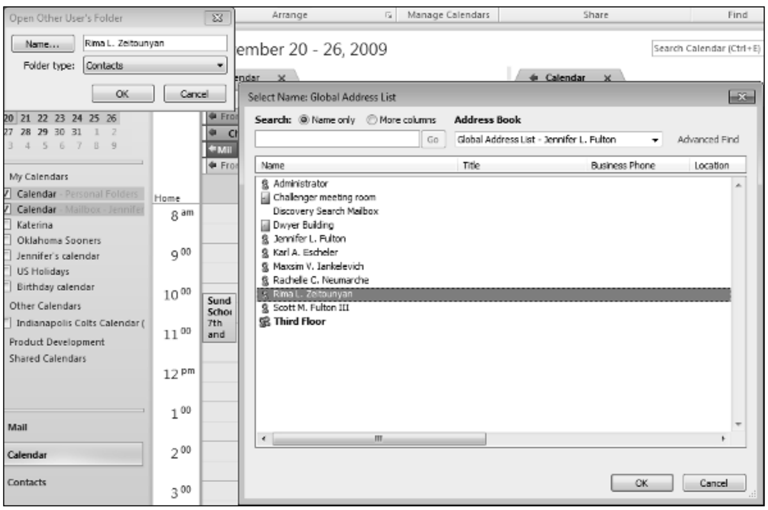

Figure 1-16: Spying on another user, kinda.

If, for some reason, you don't have access to the folder that you want to open, a message dialog box appears, asking whether you want to request access. Click Yes, and Outlook will open up a message form showing the formal request for access sharing. The recipient only needs to accept your request automatically, and the sharing process will begin immediately. (Don't you wish Congress worked like that?)

Dealing with meetings and tasks as a delegate

After you have the folders for that special someone who's stuff you promised to take care of appearing right there in your Outlook, all nice and ready to go, you just need to sit back and wait for a meeting or task request or reply to come in (if that's what you're taking care of). If you're in charge of other things, as well, such as adding or canceling appointments, well, just go ahead and take care of that, too.

Follow these steps to deal with meeting or task requests that come in for the person you're covering for:

1. **Open the task or meeting request to which you want to reply.**

   If the colleague whose stuff you're handling left the Delegate Receives Copies of Meeting-Related Messages check box selected, any incoming meeting requests appear in your Inbox, where you can easily deal with them. If your colleague didn't select this option when he or she set you up as a delegate, then you need to actually check that person's mailbox for the requests (you need at least Reviewer access, as opposed to None, to open the person's mailbox).

2. **When the task or meeting request comes in for the person who made you a delegate, double-click the request to open it, as shown in Figure 1-17.**

   The InfoBar reminds you that this request is actually for someone else.

   Unless you were given at least Reviewer access to your colleague's Inbox, you need to do some digging to find and reply to task requests because they don't appear automatically in your Inbox. With Editor access to Tasks, you can use the steps in the preceding section to display your colleague's Tasks folder, and then, when task requests come in, they appear amid the other tasks in your own Tasks list in bold (until you open them, that is).

   To help you quickly identify task requests, sort your colleague's Tasks list by person responsible. Click the Change View button on the View tab and select Assigned from the pop-up menu that appears.

Here is where you see the request's true recipient.

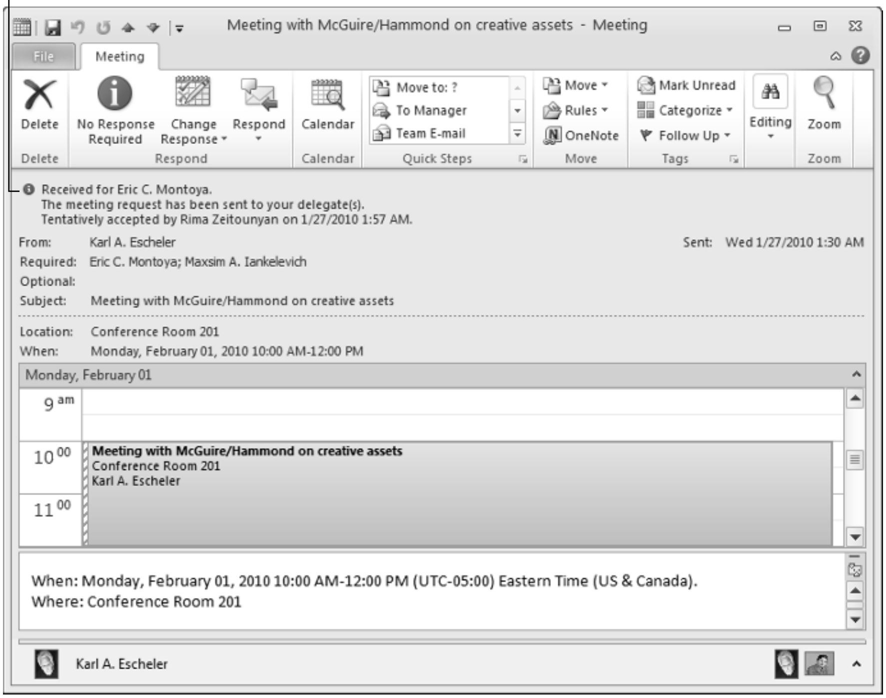

Figure 1-17: As delegate, you can open up somebody else's requests.

3. **To see the subject of the meeting request on the calendar, double-click the meeting in the request.**

   Outlook switches to the Calendar module. There, the requested time shows up in a calendar specifically marked for the other person, not for you. In case it's still confusing, the other person's name also appears in the meeting box as one of the invited attendees.

4. **Click the meeting box to select it, click the Accept, Decline, or Tentative button on the Meeting tab to respond on the recipient's behalf.**

   As the delegate, hopefully you've been given some guidelines on how to determine whether to accept a meeting or task request. If not, you can always turn to the Magic 8 Ball. In the pop-up menu that appears when you click one of these buttons, you can send your choice now by selecting Send the Response Now. But since you're the delegate, you may

prefer to select Edit the Response Before Sending — this way, you can explain to people that you believe, on behalf of that other person, that he or she is definitely, certainly not sure. You could also select Do Not Send a Response, which doesn't send any response to the request at all, but just how friendly is that?

If you selected Edit the Response Before Sending from the pop-up menu, then a message form appears; type a response in the large text box and click Send to send the message. The From box clearly says that this message is from you, on behalf of someone else, so no worries there.

If you want to propose a different time to meet, skip this step and continue to Step 5;

5. **To suggest a different meeting time on the other person's behalf, click the Propose New Time button on the Meeting tab.**

   In the pop-up menu, select Tentative and Propose New Time to accept on the other person's behalf, for now; or Decline and Propose New Time, to reject the current proposition. You'll see the Propose New Time dialog box, which gives you a cool way to select an alternative time from a separate calendar. You can make your suggestion in a number of ways:

   - *To manually select a time:* Click in your row on any time slot that's open. The proposed time is flanked by green and red bars on the left and right, respectively. You can also select a new Meeting Start and Meeting End date and time from the drop-down lists provided.
   - *To have Outlook propose a new time:* Click the AutoPick Next button. Outlook finds the first available free time slot for all attendees. Click the << button to locate the first free time slot available in the vicinity of the original appointment, usually later, within the same day if possible. The suggested meeting time is flanked by green and red bars.
   - *To reset the suggested time to the current meeting time:* Click Current Meeting Time.

   After selecting a new time, click Propose New Time. A meeting reply (message) is created. The InfoBar of the message form displays the current meeting time and the one you're proposing. Type a reason for your proposed new time in the large text box if you want, and click Send to send the message. The From box clearly says that this message is from you, on behalf of someone else, so again, there's no confusion here.

To create a meeting request or task request on behalf of someone else, follow these steps:

1. **Open the other person's Calendar or Tasks folder.**

   See the preceding section for help accessing someone's folders.

2. **Click the New Items button on the Home tab and select either Meeting or Task from the pop-up menu that appears.**

   Create the meeting or task request in the way you would for a meeting or task of your own. For help in creating meeting requests, see Book IV, Chapter 4. For help with task requests, see Book VI, Chapter 3.

3. **Click Send.**

   When a colleague receives the meeting or task request, he sees that you created it, but on behalf of someone else. He knows exactly who's asking the favor and who owes him one if he ultimately accepts.

When meeting replies come in, you simply need to open the messages to have Outlook add that person's Accept, Decline, or Tentative response to the meeting total. For task replies, you need to open the message so that you can at least see whether the person you sent it to accepted the task.

Dealing with e-mail as a delegate

Managing a few meeting replies or task requests that come in while someone's on vacation should probably amount to very little work on your part. Of course, if it's your full-time job to manage someone's schedule, that's another matter altogether. Still, dealing with appointments, meetings, and a few stray task requests is nothing compared to dealing with a steady stream of incoming e-mail. I mean, I know how much e-mail I get on any given day, and if I had to double that by taking on someone else's e-mail, I'd probably never be able to leave the office.

To send out a new e-mail on someone's behalf, follow these steps:

1. **Click the New Items button on the Home tab, and then select E-mail Message from the pop-up menu that appears.**

   A message form jumps up.

2. **In the InfoBar of the message form, if you don't see a button marked From with your account name beside it, then you need to add it to your form.**

   Click the Options tab, and under Show Fields, click From. The From button and your account name will immediately appear in this form, as well as the forms for all other messages you create later until you decide to turn this option off.

3. **In the InfoBar, click the From button and select Other E-Mail Address from the pop-up menu that appears.**

   The Send From Other E-Mail Address dialog box opens, as shown in the background of Figure 1-18.

4. **In the From box, type the name of the person for which you're creating the e-mail .**

   Alternatively, click the From button and select the name from the Choose Sender dialog box by selecting a name from the list and clicking OK. See the foreground of Figure 1-18. After you click OK, you're returned to the Send From Other E-Mail Address dialog box. Yes, you can choose any name from this list, and you may even think you're sending a message as that person. But if you try to send a message as someone who hasn't given you permission to do so, Exchange will send you back a nasty letter scolding you. And there'll be an audit trail on the admin's system as well.

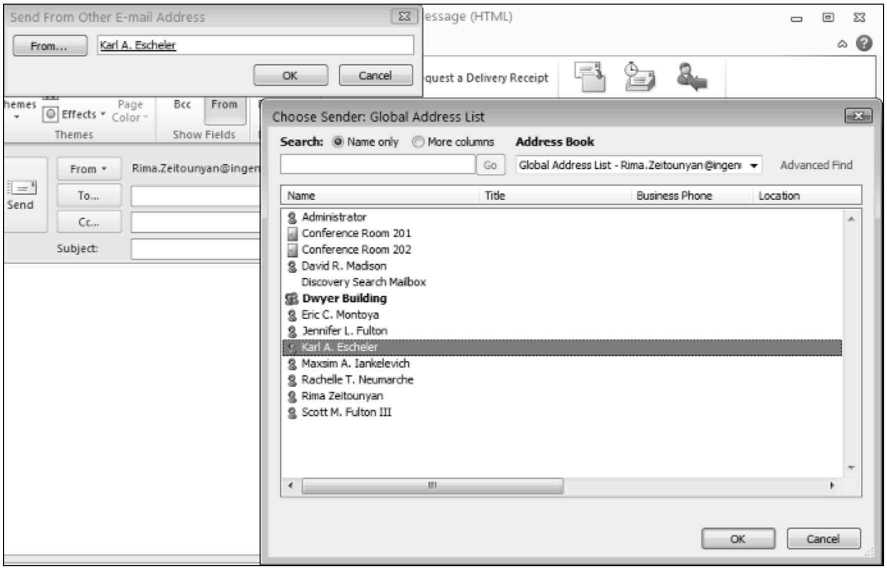

Figure 1-18: Sending an e-mail that's not from you.

5. **Address the e-mail, type a subject in the Subject text box, and enter your message (or rather, your colleague's message) in that big white text box at the bottom of the form.**

   If you need help creating the e-mail, see Book II, Chapter 1.

6. **When you finish creating the e-mail, click Send.**

   If you were very explicit in your e-mail, then the recipient will know that you sent the e-mail, but he or she also knows that the message was ultimately from someone else. Exchange gives away the secret: Your colleague's name automatically appears in the From text box. (Refer to Figure 1-19.)

To reply to somebody else's e-mail for whom you're acting as delegate, you need to be able to view the contents of his or her Inbox first. See the section "Displaying somebody else's folders," earlier in this chapter, for help. After you display his or her Inbox, follow these steps to reply to messages:

1. **In your colleague's Inbox, select the message to which you want to reply.**
2. **Click Reply.**

   A message form appears, as shown in Figure 1-19. Your colleague's name automatically appears in the From text box.

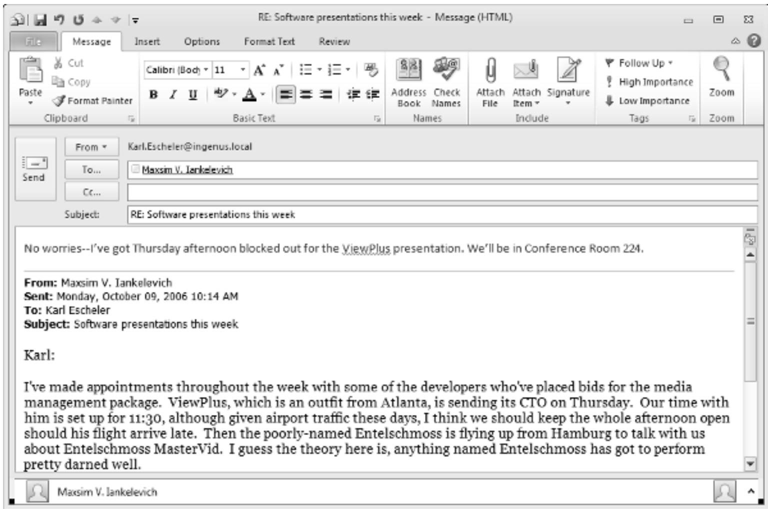

Figure 1-19: Ghost writer.

3. **Type the reply in the message text box and click Send.**

   The message arrives in the recipient's mailbox, clearly addressed from you (with your name in the message's InfoBar), acting on the behalf of your colleague.

TIP

You can follow these same basic steps to forward a colleague's e-mail to someone else, on his or her behalf.

Dealing with appointments as a delegate

As a delegate, if you have access to somebody's calendar, you can not only reply to meeting requests and open meeting replies, but you can also add appointments and events.

Follow these steps to deal with someone else's appointments:

1. **Select your colleague's calendar in the Navigation pane to make it active.**

   If the calendar doesn't appear on the Navigation pane, see the section "Displaying somebody else's folders," earlier in this chapter, for more info.

2. **Click the New Appointment button on the Home tab.**

   An appointment form appears.

3. **Complete the appointment like you would for your own appointment: Add a subject, location, start time and date, end time and date, and so on.**

   If you need help in creating an appointment, see Book IV, Chapter 1.

4. **Click Save & Close to save the appointment.**

   The appointment appears in your colleague's calendar, and it doesn't appear in yours.

TIP

Follow these same basic steps to add an event to somebody else's calendar. For help in creating a meeting on behalf of someone else, see the section "Dealing with meetings and tasks as a delegate," earlier in this chapter.